

# Trusted Messengers

## Enlisting Community Health Workers and Other Trusted Messengers in SNAP Outreach

This chapter introduces community- and faith-based organizations to a valuable community resource: Community Health Workers (CHWs) who are those trusted messengers in the community who effectively communicate with our target audience. Also included in this chapter is a step-by-step guide on how to do SNAP outreach using CHWs and tips to secure funding for your project.

### ***Who are CHWs?***

CHWs are individuals who are trusted members of their communities. They can help with your organization's outreach efforts. Depending on where you reside, CHWs may be known as trusted messengers, barefoot doctors, health promoters, health agents, village health workers, public benefits coordinators, aging service coordinators, or promotores/promotoras (typically used among Spanish-speaking audiences). For the purposes of this chapter, "community health workers" or "CHWs" will refer to all trained and trusted messengers including those individuals known only as volunteers.

CHWs often act as connectors between community residents and social service systems, and some may be trained as paraprofessionals to provide limited health care. They typically serve low-income populations and are either volunteers or receive a small stipend for their services through community-based organizations. CHWs usually obtain train-the-trainer instruction through community organizations or health clinics.



### **Tools & Tips**

When considering a CHW, think of a trusted member of the community who:

- Understands the needs of the community
- Helps educate hard-to-reach populations about various programs
- Can link SNAP offices with hard-to-reach populations
- Knows how to reach community members and is familiar with where they gather
- Provides information and conducts culturally and linguistically appropriate outreach

### ***What types of services do CHWs provide?***

A CHW can perform multiprogram outreach and help educate community residents about various programs such as SNAP. Individuals and families often are not aware of all of the programs offered in their communities or may be confused about program requirements or intimidated about applying. CHWs can help provide accurate information to the people they live among.

A CHW can also offer interpretation and translation services, help people receive care they need, and provide culturally appropriate health and nutrition materials and information.

### ***Why is it important to enlist CHWs in SNAP outreach efforts?***

Because CHWs help bridge social and cultural barriers between community members and health or social service systems, they can be especially effective in conducting outreach to low-income, minority, and urban and rural communities.

***If my organization's CHWs expand their outreach efforts to include SNAP, how do I involve my local SNAP office with our project?***

Begin by making an appointment with the local office to discuss your project. State or local SNAP representatives should be able to provide you with SNAP data showing areas with low participation. They can also tell you what other organizations may be doing and where they could use your help. They can also let you know if any community organizations are conducting outreach through the [State outreach plan](#).

For the SNAP office to be of assistance, it's important that they understand your project. It is also important to establish a point of contact at the local office who can help develop your project. As with any project, it will operate more efficiently if protocols and procedures are established and followed.

Of course, the amount of local office involvement will depend on what activities your CHWs will be performing. The more complex the activities (e.g., filling out application forms or prescreening for eligibility), the more involved the local office may want to be. If your project will have CHWs filling out application forms, they need to understand the questions on the form as well as the process to submit completed applications.

***How do I identify and locate CHW volunteers?***

You may wish to talk to other community partners such as faith-based organizations and grassroots groups such as community service organizations about their volunteer networks. Ask them to help identify people that the community turns to for information. Other sources of volunteers might be national organizations such as Area Agencies on Aging that have local chapters. Contact them or check their Web sites to find out more about their volunteer networks at the local level.

***How do I determine which CHW outreach activities might be right for my community?***

A community needs assessment can help you learn about unmet needs, identify available resources, meet new partners, and find good opportunities to collaborate on projects. You may be able to work with other community groups to conduct the assessment.

***What do I do if other groups are performing the SNAP outreach activities that I would like to do?***

Talk to the groups who are conducting SNAP outreach in your community. Ask if your organization can help with their existing outreach efforts. If your community has not done a needs assessment, suggest it.

If you find that existing outreach efforts already cover an area that you had targeted or duplicate what you are planning, you may decide to work in a different part of your county or State or take on other aspects of outreach that complement existing efforts.



**Recipe for Success**

*“Promotoras have a natural ability to relate and speak to the people with whom they share a common neighborhood. Trust is the basis for their successful and efficient community labor.”*

Maria Lemus, Executive Director  
Vision y Compromiso



**Tools & Tips**

When coordinating with other groups or volunteer networks, consider using a map to assign separate areas in a community for SNAP outreach efforts.

### ***What reporting process should I set up with CHWs during the outreach project?***

It will depend on your project. With any project, if information is being collected, it is important to develop appropriate documents and procedures. Documents that must be completed by CHWs should be developed prior to training and explained at your training session.

During initial training, ensure that CHWs have a good understanding of their role in the project, what documents they need to maintain, and the reasons why. Outreach strategies may vary from county to county, so you may need to customize your reporting documents.

### ***Are there templates that I can use?***

Yes, there are templates you can use to help facilitate your train-the-trainer session. You can find them under the main toolkit Web site page.

Templates include:

- Sample curriculum
- SNAP verification check list
- English-language card with SNAP eligibility information
- Spanish-language card with SNAP eligibility information
- “Release of Information” form
- Monthly reporting template to report progress or to help with project evaluation
- Certificate for completion of training
- Budget template

### ***What is a good way to train CHW volunteers?***

A train-the-trainer model is an effective way to teach processes, procedures, and expectations to your volunteers. In this model, you can start by locating and training 5 to 10 people who show leadership skills, and they in turn train others.

Since CHWs may have preferences on what types of SNAP outreach activities they will perform, you must decide prior to screening them whether you will allow some flexibility.

### ***After lead CHWs have been trained, what should my next steps be?***

To strengthen and expand your volunteer network of CHWs, lead CHWs should recruit additional trusted messengers who are willing to do SNAP outreach. The things that volunteers are willing to do may vary for a number of reasons, such as available time or willingness to ask personal questions about a household’s income or assets.

### ***What are some activities lead CHWs can perform?***

In order to have a number of CHWs involved with your project, it is important to negotiate each CHWs role. To get you started with ideas, some activities include:

- Find and train other CHWs to assist with outreach.
- Coordinate information sessions with their fellow CHWs, community leaders, and volunteers to further disseminate information about SNAP among the target population.
- Report back to your organization about efforts to obtain new volunteers.
- Plan and schedule trainings for new CHWs and refresher training, as needed.
- Maintain a database of trained volunteers, what work they are trained to perform, and time spent on project work.
- Compile information to evaluate projects.
- Respond to policy questions or coordinate them with designated individuals at local SNAP offices.
- Conduct outreach to potential clients and make any necessary referrals.

### ***How can my organization promote my outreach project?***

Local talk show hosts welcome community news, especially if it is a public service. Utilize radio or television community events shows; advertise in community newspapers, church bulletins, fliers, and brochures. You may also ask other organizations to include information in their newsletters, on Web sites, or in their brochures. To get organizations to use your message to promote your project, develop talking points. These can also be used for radio announcements, inserted into speeches, or provided to individuals such as pastors or business leaders who may be discussing your project.

If you have a funding source, you may wish to purchase advertising. If there is no funding for paid advertising, public service messages can help spread the word.

# Planning and Implementation of Your Project

Are you ready to enlist CHWs in your program's community outreach efforts? If so, read through the following 10-step guide on developing a SNAP outreach project.

## Step 1 Describe your project.

Take time to decide what activities will take place. You can start by expanding existing activities. You can also include new activities such as SNAP prescreening.

If you plan to obtain funding, you should include local data to show the need for this project. It is important to present your business case to potential funders.

As you meet with others, your project description will probably change.



### Tools & Tips

The time required to develop your project will depend on the complexity of your activities and funding sources. For example, if you need to obtain funding for stipends, travel, or other expenses, develop your timeline with this in mind.

## Step 2 Meet with SNAP offices.

Once you have a general idea of your project, contact your local SNAP representatives to schedule a meeting. To find your local SNAP office, please visit <http://www.fns.usda.gov/snap/outreach/map.htm>. Be prepared to discuss your plans and answer questions. You may wish to include other partners involved with your project in this meeting. If they are not able to join you, you may want to present letters of support.

Below are some questions that you may wish to ask your local or State SNAP office, depending on the nature of your project:

- Has your office participated in the development of a community needs assessment? If yes, can I obtain a copy or speak with someone who worked on the needs assessment?
- Are there any organizations receiving funding through your State outreach or nutrition education plans? If yes, what services are they performing and do you have contact information?
- How could our project complement current SNAP outreach activities conducted by your office or other outreach organizations?
- Have other organizations or volunteer networks contacted your office? Are you currently working with other organizations? If yes, how does their project fit in with what my organization is proposing? Can you share your experiences working with organizations like mine – what worked or didn't work on these projects?
- Are you aware of any organizations that might be interested in helping us with this project?
- What challenges do you face when working with our community?
- Can you provide data that highlight the greatest areas of need in the community? Can you identify areas that need additional outreach efforts?
- Would a SNAP representative be willing to be a primary contact for our program's outreach efforts?
- Would you be able to provide training to our outreach workers on SNAP requirements and procedures?



### Tools & Tips

Maintain a close partnership with your local SNAP office. Your SNAP office is a key partner to the success of your project. Assure your SNAP contact that you will keep him or her posted and updated during the development and implementation of your project and training. Exchange contact information.

- Will you be able to provide training materials/modules/lesson plans for our use in training outreach workers (such as those you use for your own workers)?
- What local materials do you have that my organization can use? Can you provide us with a quantity of these materials or, if not, do you have a sample we might use to create our own materials?
- Do you maintain a list of volunteers or know of any organizations that use volunteers?
- Can you identify trusted spokespersons in the community that may be able to help with our project?
- Can your office help collect data to use for evaluation by tracking number of calls after an event, number of applications filed, number approved, or number denied?



### Tools & Tips

Resolving project issues is important to the success of any partnership. Make sure to have steps in place to identify and correct problems, such as if a CHW is not correctly filling out a SNAP application form. Let your SNAP contact know how the problem was resolved. As projects evolve, problems often occur and procedures may need to be revised.

### Communication

Keep each other informed of project changes, SNAP events that may increase calls or visits to the local office, and lessons learned. Flexibility is a must!

## Step 3 Establish a staffing base.

Contact nonprofit organizations in your local community to identify CHWs who can be recruited and trained for SNAP outreach. Here are some community action areas where you might find a diversified group of CHWs:

- Education (preschools, English Language Learners programs, school boards)
- Health (community clinics, hospitals, school nurses)
- Leadership (community-based organizations and labor groups)
- Housing (neighborhood associations)
- Area Agencies on Aging (community-based organizations)



### Tools & Tips

Many national organizations have local chapters throughout the country. Contact these national organizations to find their local chapter to ask about their local volunteer networks. A sample list of national organizations can be found on page 11 of this chapter.

## Step 4 Materials and meetings.

Materials designed to capture the attention of potential CHWs can be distributed at various offices, meetings, or conferences. Be sure to provide contact information and explain the need for your project ([business case](#)), and various roles individuals and groups can play.

After any meeting, follow up with a letter thanking those who participated and explain next steps. A next step may be to schedule one-on-one meetings with interested CHWs.

## Step 5 Training and approvals.

After you have prepared your curriculum, develop your training materials based on the activities that CHWs will be performing. Make sure you develop them around local and State policies. States differ in how they run their programs and these differences can affect how eligibility is calculated. SNAP offices may also be willing to share training materials or prescreening tools used to train their own employees and may be willing to participate in your training sessions.

Your training materials should include written project procedures, such as:

- How to submit signed and dated applications to the SNAP office
- How to obtain SNAP policy clarifications
- How to communicate lessons learned on what is working and not working
- What data must be collected and reported for the project evaluation

Before you begin training, ask your local SNAP office to look over your curriculum and SNAP materials. Other participating partners may also want an opportunity to provide feedback on materials. If your local office makes any changes to your materials, make sure you understand why the changes were made.

## Step 6 Conduct training sessions.

Train CHWs to become qualified SNAP outreach providers. Since not all CHWs will speak English, some training will need to occur in their native language. To help them, make sure bilingual partners who understand the material are present at your training sessions. It is also important to have your local SNAP contact present for SNAP eligibility discussions. That way, the contact can respond to technical questions about eligibility requirements and the application process.

Your training sessions might include:

- Basic information about SNAP
- Clarifying the myths surrounding SNAP benefits and the process
- Emphasizing nutrition benefits of SNAP
- Basic interviewing strategies
- Information and practice on conducting an eligibility prescreening
- How to fill out the SNAP application form; practice sessions to understand what questions mean
- Verification documents required for application
- Outreach strategies that work
- Outlining specific procedures to submit completed (signed and dated by applicant) SNAP application forms
- Discussion of who will handle policy and procedural questions
- Reporting requirements, including information and data that need to be reported for project evaluation



### Tools & Tips

If you want your project to be successful, adequate training must be provided to outreach providers. Because of the complexity of SNAP regulations, miscalculating a benefit amount during a prescreening can make the certification interview more challenging for the eligibility worker who must explain the discrepancy to the client who trusted you to provide correct information.

When possible, use State/local SNAP information and training materials because they are more precise. This means less development and preparation time, which can cut project costs.

You may wish to work with your local office and partners to establish a formalized training program for CHWs. Some States, like Texas, offer a certification program through colleges.



### Tools & Tips

Remember CHWs know their communities. Focus on getting their feedback about community outreach ideas that are practical, acceptable to their audience, simple, and meaningful.

Refine and modify the curriculum as needed after the train-the-trainer sessions. Lessons learned can strengthen your presentation and better prepare your audience.

Providing on-the-job training will strengthen and add credibility to your project. Assign a mentor to work with CHWs for a certain number of hours before awarding the certificate. This will demonstrate to your local office that your CHWs have the skills required to do the job.

Participants attending training should receive a packet of information to reinforce what they learned. The packet might include:

- A binder or folder containing the curriculum, PowerPoint presentation(s), procedures, and reporting materials
- Blank SNAP application forms for training purposes, if available
- Web site locations; this is especially important if applications are filed electronically
- An electronic disk containing the PowerPoint presentation and curriculum

## Step 7 Award training certificates.

Upon successful completion of the training program, CHWs should receive a certificate.



### Tools & Tips

**Establish a database of trained volunteers.**

This enables local SNAP workers to contact CHWs when applicants need their assistance.

**Partnerships benefit everyone.**

Local SNAP workers benefit from the assistance provided by CHWs, CHWs benefit because their clients are receiving nutrition assistance, and applicants benefit by receiving excellent customer service.

## Step 8 Provide resources.

When CHWs successfully complete training, provide them with appropriate resources and tools for SNAP community outreach. Some items you may wish to provide are:

- Presentation cards/name tags to identify them as CHWs from your organization
- Office supplies such as clips, staplers, staples, pens, clip boards, etc.
- A binder with contact information, PowerPoint presentation, SNAP application form or Web site location for an online application; supporting information on how to fill out the application form; reporting forms; and instructions for filing or following up on submitted applications.
- "Release of Information" documents. CHWs will provide this document to local SNAP offices showing that the client authorizes the worker to disclose such information as case status and reasons for processing delays or denials.
- [Verification envelopes](#). Verification envelopes list the documents applicants need to obtain in order to get certified for SNAP benefits. Since some documents like rent receipts can easily get lost, the envelope is a good place to store materials and keep them organized.
- Resources available for the project such as flip charts, handouts, or chalk or white boards. Will laptop computers be loaned out? If yes, CHWs may need to sign them out.

## Step 9 Publicize the project.

People in your community need to know who you are, what you plan to do, and how to contact you. Can these individuals be directed to a toll-free number or Web site address? Ask partners if you can obtain copies of their materials to which you might add a sticker with additional information on your project. Use your community contacts such as radio or television celebrities. Check out the media section of this toolkit for other ideas.

## Step 10 Evaluate the Project.

Find out what is effective in your project. Your budget and activities will determine what evaluation techniques might be needed. See the evaluation section of this toolkit for ideas on how to measure success.

# Quick Guide To Prepare a Plan for Funding

A well-written plan can provide the basis for funding requests as well as for any nonmonetary support you are seeking. If your organization intends to request funding from a foundation or other sources, the following are some items you might want to include. These will give a potential funder a clear understanding on how your organization will spend its dollars. These topics should also be covered when seeking partnerships, collaborations, and nonmonetary support.

- **Project description.** Explain who you are targeting and why this project is needed, supporting your description with data. Explain the outreach activities that will be conducted and where these will occur (e.g., schools, homes, clinics, etc.). Note the locality of your planned activities. Describe any current efforts and how the new activities will fit in.
- **Training.** Describe the training needed and frequency of training. For example: “Training will be conducted as needed to update CHWs on new policies, and periodic training will occur every 3 months for new volunteers.” State what role the SNAP local agency might have in the training.
- **Description of roles and responsibilities.** Describe all positions and identify those that will be funded under your project. Document if some CHWs will be donating their time to the project. Also, identify the person with management oversight of your project, and who will resolve issues or disputes. Identify who will screen, select, supervise, train, schedule, and provide recognition for volunteers and other staff. Explain whether volunteers will receive any reimbursements for travel, supplies, etc.
- **Partnerships.** Describe existing partnerships and how they fit in with your project. You may also want to describe efforts to expand your partnership base. If you are conducting a SNAP project, discuss your partnership with your local office.
- **Publicity.** Describe how you will publicize your project. If there are costs for printing or paid advertising, be sure to include them in your budget.
- **Evaluation of activities.** Describe the information you will collect and use to evaluate the project, such as number of project applications submitted, approved, or denied. Explain how this information will be collected and who will collect it. Will it be a paid consultant, a volunteer from a local college or university, or an employee from your organization? Describe the local SNAP office’s role in data collection, if any.
- **Project organization.** Describe how the project fits in with your existing organization. A good way to do this is to modify your group’s organization chart to include your project. Work flow may be important to some funders.
- **Time table or task table.** It should show activities, start and end dates, and person who is responsible for each activity.
- **Funding sources.** Mention the source of any funding for other aspects of your project, and what that funding covers. Identify what the new funding you are seeking will cover. You want to assure the funder that its resources will be used to pay for new, as yet unfunded activities.
- **Budget and budget description.** If you are requesting funding, you should develop your budget. You should also explain how you arrived at the figures by providing a list of assumptions. Funders want confirmation that dollars provided for your project are used for that project.



## Tools & Tips

If you are applying for a grant, carefully read through the grant request to make sure you understand the requirements. Submit questions as directed, and follow the instructions. If there are evaluation criteria, be sure to adequately explain how you will meet each criterion. Allow yourself adequate time to put the package together.

It’s always a good idea to let someone proof your proposal to make sure you covered everything and that there are no grammar errors or typos.

# List of National Organizations for Possible Partners

## African American

100 Black Men of America  
 National Association for  
 Advancement of Colored People  
 National Association of Black Social  
 Workers  
 National Council of Negro Women,  
 Inc.  
 National Urban League  
 United Negro College Fund

## Asian American

Asian and Pacific Islander American  
 Health Forum  
 Asian American/Pacific Islander  
 Nurses Association, Inc.  
 Chinese American Citizens Alliance  
 National Alliance of Vietnamese  
 American Service Agencies  
 National Korean American Service &  
 Education Consortium  
 National Coalition for Asian Pacific  
 American Community Development

## Hispanic

Hispanic Association of Colleges and  
 Universities  
 League of United Latin American  
 Citizens  
 Labor Council of Latin American  
 Advancement  
 National Alliance for Hispanic Health  
 National Council of La Raza  
 National Hispanic Council on Aging

## Native American

National Congress of American  
 Indians  
 National Council of Urban Indian  
 Health  
 National Indian Child Welfare  
 Association  
 National Indian Council on Aging  
 National Indian Education Association  
 National Indian Health Board

## Rural

National Organization of State Offices  
 of Rural Health  
 National Rural Funders Collaborative  
 National Rural Health Association  
 National Rural Housing Coalition  
 Rural Community College Alliance  
 The National Rural Network

## Seniors

AARP Foundation  
 Meals on Wheels Association of  
 America  
 National Association of Nutrition and  
 Aging Services Programs  
 National Council on Aging  
 State Health Insurance Programs  
 (SHIP)

# SNAP Document Verification Checklist Template

Please consult with your local or State office before finalizing and using this checklist. It is important to find out if the State has an existing document that you can use. If not, work with your State to ensure that you are gathering the information they need. Your form should always state that a case worker may ask for additional documents. You may also want to mention that it is possible for the same document to serve for more than one category, for example, a driver's license can verify identity and address.

# SNAP Document Verification Checklist Template

## SNAP Document Verification Checklist

### To verify your identity

- ☐ Driver's license
- ☐ School or work identification
- ☐ Medical insurance identification
- ☐ Voter's registration card
- ☐ Birth certificate

### To verify your address

- ☐ Library card showing address
- ☐ Voter's registration card
- ☐ Utility bills
- ☐ Rent or mortgage receipts showing address
- ☐ Correspondence sent to stated address

### To verify your income

#### **(Present Document For Each Income Source)**

- ☐ Check stubs (*Confirm number required with local office*)
- ☐ Employer statement (if you get paid in cash or if you do not have your check stubs)
- ☐ Social Security, Supplemental Security Income, or Veteran's Benefits
- ☐ Other Retirement or Disability Benefits
- ☐ Alimony
- ☐ Child support agreement
- ☐ Unemployment compensation
- ☐ Self-employment income (Includes rental income and freelance work; *check to see what form local office is using or provide tax returns*)
- ☐ Other, please specify.

### To verify your immigration status

- ☐ Immigration and Naturalization Documents (These are not required if you are not eligible for SNAP and you are only applying for your children who were born in the United States.)

### To verify your resources

- ☐ Bank accounts, savings accounts, and/or CD's
- ☐ Stock Shares or bonds
- ☐ Proof of rental properties
- ☐ Other, please specify.

### To verify your expenses

- ☐ Rent or mortgage payments
- ☐ Property taxes
- ☐ Insurance on property
- ☐ Utilities receipts (gas, water, electricity, etc.)
- ☐ Child care costs
- ☐ Income summary if child support is deducted from wages or income
- ☐ Other, please specify

### **Medical expenses deduction (only for households of elderly, age 60 or older, or disabled persons) for expenses not covered by insurance**

- ☐ Summary of provided services such as doctor or hospital visits
- ☐ Detailed receipts showing unreimbursed medical expenses
- ☐ Identification from the Medical Assistance Program for persons 65 and older (Medicare) that shows Plan "B" coverage
- ☐ Prescription pill bottles showing cost on label or printout
- ☐ Medical payment agreement
- ☐ Invoices or receipts for medical equipment (including the rental cost)
- ☐ Receipts for transportation and lodging to obtain medical treatment
- ☐ Other, please specify